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# STATE OF INDIANA

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DEPARTMENT OF LOCAL GOVERNMENT FINANCE



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## **Assessment Progress Introduction**

On-time property tax billing is a culmination of a year's worth of work of locally elected officials. The process can be separated into two stages: Assessment-to-Budget and Budget-to-Tax billing. Because these two stages are closely tied, delays in any of the steps in these two stages can have an affect on the timing of property tax bills.

The first step in on-time billing is timely completion of the assessment process, also known as trending, a function of the office of the county assessor. Once the county assessor has completed trending, a report called a "ratio study" is submitted to the state for review and approval. Once the ratio study is approved, the assessor submits the gross assessed values to the county auditor, who then applies deductions and exemptions to determine the final net assessed values of properties. This information is then used to determine tax rates, which translate in tax bills for property tax payers.

The following five reports contain information provided by the county to show their progress in completing the 2007-pay-2008 assessment process.

The first two separate reports are of the Real Property and Personal Property status in a particular county. They show detailed synopsis of progress made, problems or delays encountered, and goals set by the county assessor. Information provided in these reports has been taken from correspondence and conversations with county officials.

The third report is of the status for the county's seven "Data Submissions." While some datasets show a significant "Number of Days Late," there are many factors which cause delays in submission of data that are outside a county official's control. These factors include but are not limited to: prior administration's delays, computer program glitches/problems, delays in receiving required information from other locally elected officials, vendor delays and legislative changes.

The last two reports are charts showing the progress of the county as updated by the county assessor. These visual aids illustrate the timeline of the "year in the life of a county assessor" and show where the county assessor falls in their steps toward on-time tax billing. The summary version shows only the key steps required for completion before their values are submitted to the county auditor. The detailed version shows each of the specific steps and the very detailed processes involved in arriving at a county's final gross assessed values.

Because each report is very technical in nature, please feel free to visit our website at [www.in.gov/dlgf/2339.htm](http://www.in.gov/dlgf/2339.htm) for a glossary of terms used.

# ***Rush County Status on 2007 Pay 2008 Assessments***

*(Per correspondence with County Officials)*

**Dataset: 2008 Assessor Real Property**

**Compliance Status: Pending**

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County Official Responsible: JoAnn Herbert

Date Took Office: 1/1/1987

Level of Certification received by or before November 2007: Level II

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Workplan Submitted:

Workplan Detail Requested by DLGF:

Workplan Detail Submitted:

2007 Pay 2008 Ratio Study Received: 3/19/2007

Workbook Values: Received

Ratio Study Approved: 1/4/2008

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Estimated Date for Completion:

What Work for Dataset has been Accomplished?

3/28/08- Completed rollover & Vendor is preparing data submission  
3/13/08- Completed roll & are working to balance with the Auditor before data submission.  
2/29/08- Continuing to proof data before roll to Auditor occurs.

Roll to Auditor?

3/13/08- Rolled to Auditor on 3/7/08.  
3/7/08- Still unable to roll to Auditor, in contact with Vendor for more information, hope to have this completed soon.  
2/29/08- Problems with Auditor's system, roll has not yet occurred. Vendor recommended holding off rolling data until problems are corrected.

Date for Splits and Combinations Entered? completed by 3/1/08

2007 Pay 2008 New Construction Entered? completed by 3/1/08

Date for completed 2007 Sales Disclosures entered? completed & submitted on 2/20/08

Date for Neighborhood Analysis?

Date for Sales Analysis?

Date for Land Valuation?

Date for Improvement Valuation - Cost Approach:

Date for Improvement Valuation - Income Approach:

Date for Improvement Valuation - Sales Approach:

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Current Vendor:

Vendor Contract Must Meet Statutory Deadlines?

Pay Vendor When Deadline Met or Monthly?

Warned Vendor for Failure to Meet Deadline?

# ***Rush County Status on 2007 Pay 2008 Assessments***

*(Per correspondence with County Officials)*

***Dataset: 2008 Assessor Real Property***

*Compliance Status: Pending*

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*Vendor Contract for 2008 Pay 2009?*

*2008 Pay 2009 Vendor:*

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*Township Actions that Delayed County Duties:*

*How are Township Actions Being Resolved?*

*Other County Action/Documentation of Efforts:*

# ***Rush County Status on 2007 Pay 2008 Assessments***

*(Per correspondence with County Officials)*

**Dataset: 2008 Personal Property**

**Compliance Status: Pending**

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County Official Responsible: JoAnn Herbert

Date Took Office: 1/1/1987

Level of Certification received by or before November 2007: Level II

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Estimated Date for Completion:

What Work for Dataset has been Accomplished?

Roll to Auditor?

Date for 2008 Mobile Home Valuation:

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Current Vendor: AS2, INC

Vendor Contract Must Meet Statutory Deadlines?

Pay Vendor When Deadline Met or Monthly?

Warned Vendor for Failure to Meet Deadline?

Vendor Contract for 2008 Pay 2009?

2008 Pay 2009 Vendor:

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Township Actions that Delayed County Duties:

How are Township Actions Being Resolved?

Other County Action/Documentation of Efforts:

## ***Rush County Data Status on Assessment Year 2007 Pay 2008 Data Submissions***

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### ***ABSTRACT***

***Office - Auditor***

***2007***

*Date Data Due* 3/15 of the Pay Year

*Date Loaded*

*Number of Days Late* 48

*Compliance Status*

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### ***BUDGETORDER***

***Office - Auditor***

***2007***

*Date Data Due* 2/15 of the Pay Year

*Date Loaded*

*Number of Days Late* 77

*Compliance Status*

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### ***PARCEL***

***Office - Assessor***

***2007***

*Date Data Due* 10/1 of the Assessment Year

*Date Loaded* 4/2/2008

*Number of Days Late* 185

*Compliance Status* Pending

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### ***PERSPROP***

***Office - Assessor***

***2007***

*Date Data Due* 10/1 of the Assessment Year

*Date Loaded* 10/12/2007

*Number of Days Late* 12

*Compliance Status* Pending

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### ***RATIOSTUDY***

***Office - Assessor***

***2007***

*Date Data Due* 6/1 of the Assessment Year

*Date Loaded* 3/19/2007

*Number of Days Late* -74

*Compliance Status* Approved

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***Note: Number of Days Late refers to the most recent submission with Compliance Status noted.***

***Note to County Official: If you disagree with these dates, please submit a written explanation with supporting documentation to [data@dlgf.in.gov](mailto:data@dlgf.in.gov).***

## ***Rush County Data Status on Assessment Year 2007 Pay 2008 Data Submissions***

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### ***SALEDISC***

***Office - Assessor***

***2007***

<i>Date Data Due</i>	3/1 of the Pay Year
<i>Date Loaded</i>	2/21/2008
<i>Number of Days Late</i>	-8
<i>Compliance Status</i>	r-nr

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### ***TAXDATA***

***Office - Auditor***

***2007***

<i>Date Data Due</i>	3/1 of the Pay Year
<i>Date Loaded</i>	
<i>Number of Days Late</i>	62
<i>Compliance Status</i>	No data

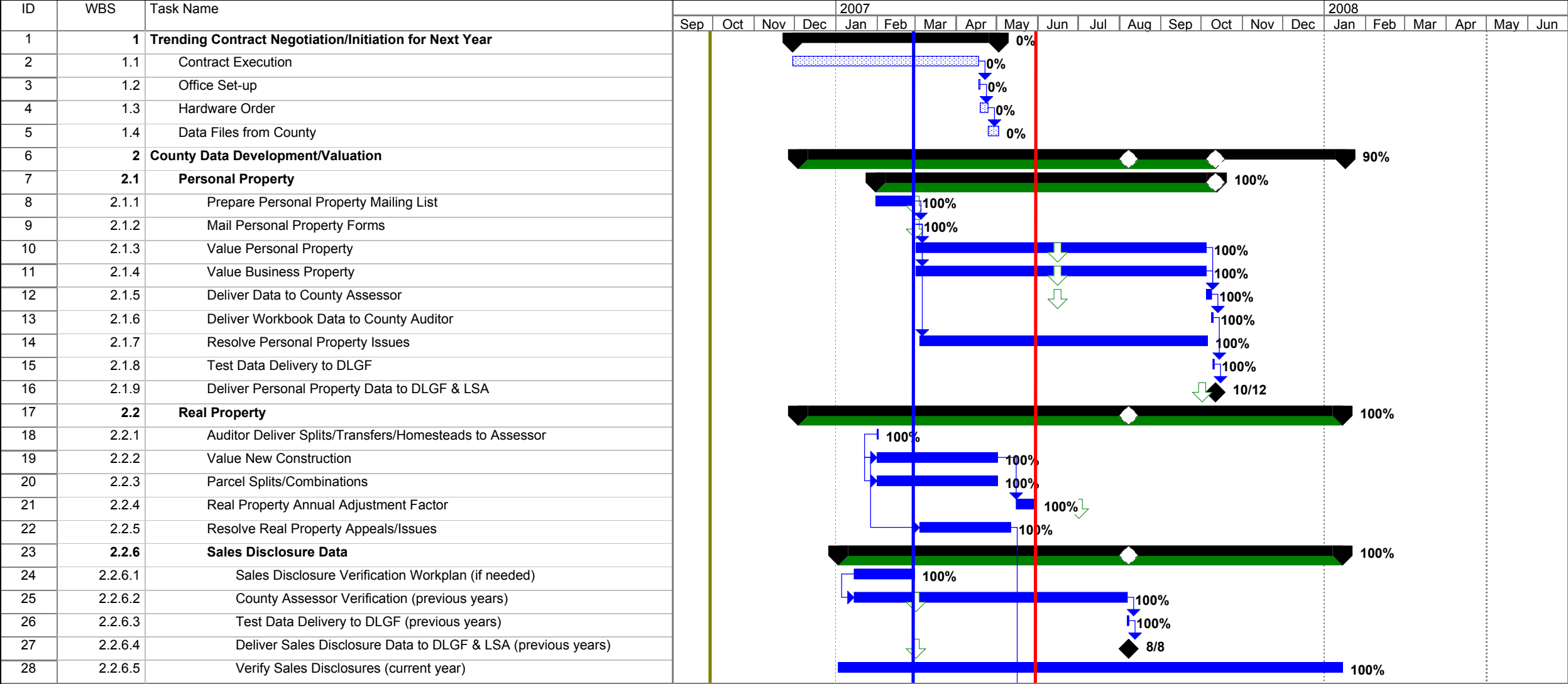
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***Note: Number of Days Late refers to the most recent submission with Compliance Status noted.***

***Note to County Official: If you disagree with these dates, please submit a written explanation with supporting documentation to [data@dlgf.in.gov](mailto:data@dlgf.in.gov).***





Project: Rush County Trending.mpp  
Date: Thu 5/1/08

Critical

Critical Revise/Resubmit

Critical Progress

Task

Revise/Resubmit

Task Progress

Baseline

Baseline Revise/Resubmit

Baseline Milestone

Milestone

Summary Progress

Summary

Project Summary

External Tasks

External Milestone

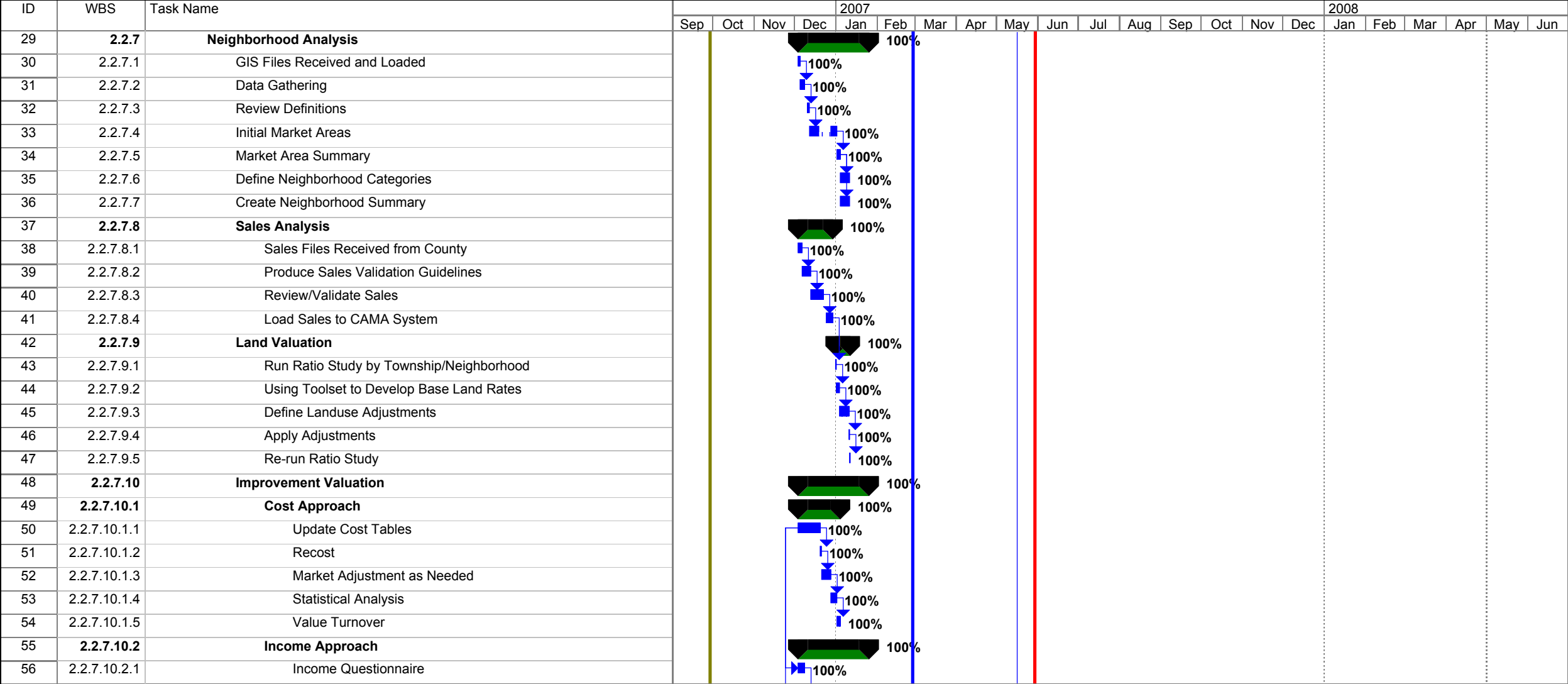
Deadline

Real/Personal Data Due

Sales Data Due

Ratio Study Due

Note: Revise/Resubmit denotes data exchange between County and/or State



Project: Rush County Trending.mpp  
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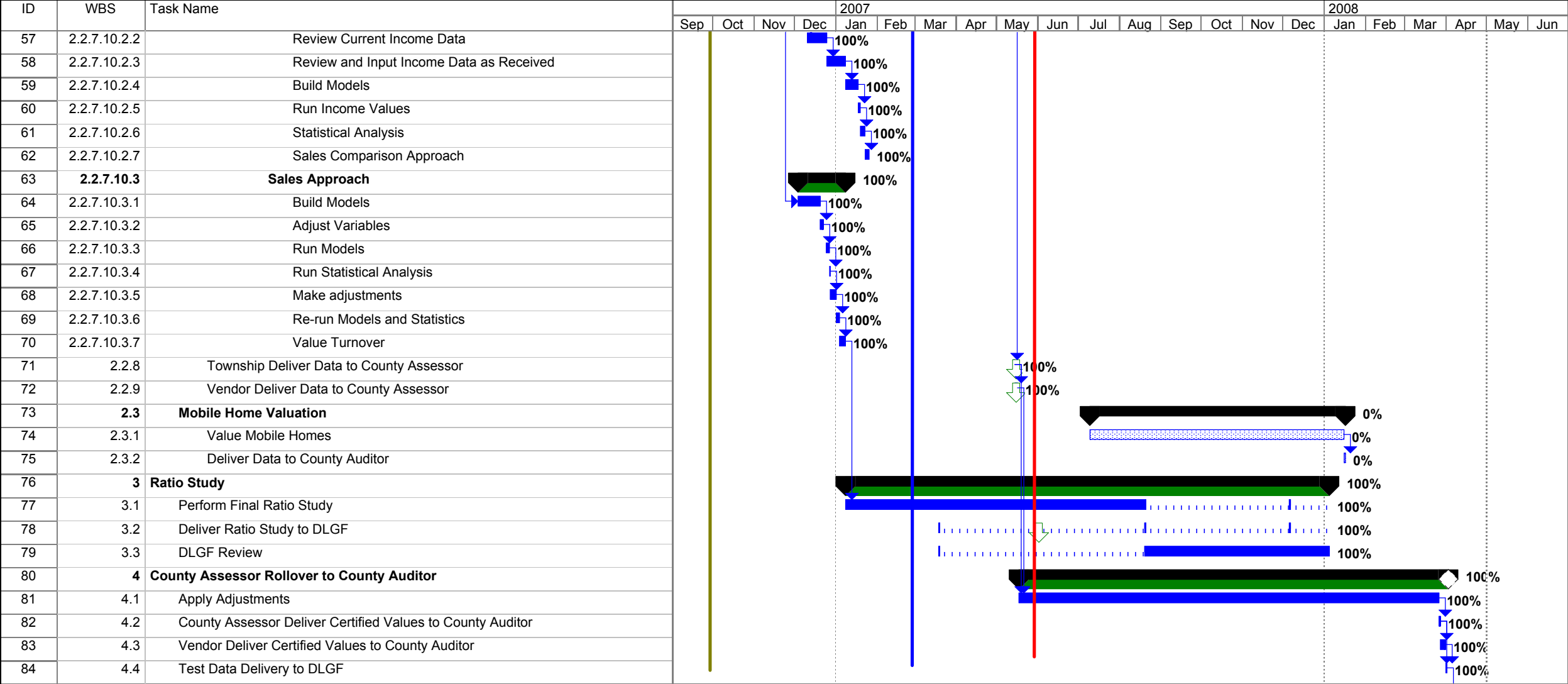
Real/Personal Data Due

Sales Data Due

Ratio Study Due

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Project: Rush County Trending.mpp  
Date: Thu 5/1/08

Critical

Critical Revise/Resubmit

Critical Progress

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Revise/Resubmit

Task Progress

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Baseline Revise/Resubmit

Baseline Milestone

Milestone

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Summary

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Real/Personal Data Due

Sales Data Due

Ratio Study Due

Note: Revise/Resubmit denotes data exchange between County and/or State

ID	WBS	Task Name					2007												2008					
			Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
85	4.5	Deliver Real Property Data to DLGF & LSA														↓					◆	4/2		



Project: Rush County Trending.mpp  
Date: Thu 5/1/08

Critical

Critical Revise/Resubmit

Critical Progress

Task

Revise/Resubmit

Task Progress

Baseline

Baseline Revise/Resubmit

Baseline Milestone

Milestone

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Real/Personal Data Due

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Ratio Study Due

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Note: Revise/Resubmit denotes data exchange between County and/or State